Technical Reference for

Packaging

2001-2002

U.S. Department of Education

265 H

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Record Descriptions

Overview

Schools have the ability to manipulate their Packaging database with an external import function. This function lets you add or modify records in the Packaging module of EDExpress by importing **External Add**, **External Change**, and **Add Funds** records from an external system. For example, you may find the need to import packaging data into EDExpress from your school's system via an external add file.

You can also export packaging data out of EDExpress. Once you have packaged your students, you can upload the information to your disbursement system. Packaging import record layouts are provided in this section, and an export layout can be printed from EDExpress. A brief description of each layout is provided on the following pages.

This document provides you with instructions and record layouts for interfacing your own software with EDExpress for packaging.

Questions regarding issues on interfacing your school's system with EDExpress should be directed to CPS Customer Service at 800/330-5947.

Instructions

Instructions are provided for five record layouts:

- Import External Add Record Description
- Import External Change Record Description
- Import Change Field Record Description
- Import Add Funds Record Description
- Export Record Description

Import External Add Record Description

In EDExpress, each imported add record runs through field by field editing during the save process. All records failing edits produce a line on an import edit report. The import edit report contains a line for each record that has a reject, a warning, or has been skipped. The report contains the student's Social Security Number (SSN), reject or warning message, and the data field in question (if appropriate).

The following fields receive a rejected error message if they are invalid or left blank during the import add process:

- Student's Original SSN

- Name Identifier

- Transaction Number

- Academic Year Profile Code

All other fields in error receive a warning message if the data field content is invalid or a required field is left blank.

Import External Change Record Description

Like the add record, each imported change record runs through field by field editing during the save process. All records failing edits produce a line on an import edit error report. Entries on the report indicate warnings about the record or any records skipped. The report contains the student's Social Security Number (SSN), warning message and the data field in question (if appropriate).

All records on the Packaging database can be updated through the external change record. Any changes listed in the import file are applied directly to the student record.

Note: If a change is made to a record with a packaging status of **P (Packaged)**, EDExpress automatically updates the status to **M (Manually Adjusted Package)**.

Requirements

The following two requirements must be addressed when building your Packaging change record:

- The Social Security Number (SSN) on the change record must be for a student who already exists on the Packaging database.

- Fields that are Display Only cannot be updated through import change.

Import Change Field Numbers Record Description

When changing data through the import external change process, you must use the correct field number for the fields you want to change.

The record description provides the information you need for changing data.

Import Add Fund Amounts Record Description

Awarded fund amounts may be imported into the Packaging database. EDExpress allows you to import records containing fund information into your Packaging database.

The fund amounts are added to the student records and are displayed on the Awarded Funds screen. The update file must contain the Fund Code and fund amount to add to the student record. All records that fail edits are printed on the import edit report.

Up to 10 funds may be added within one record. If you need to add more than 10 funds for a student, create two records within the import file.

All records, except those with a Packaging status of **N (Not Ready)**, on the Packaging database may be updated through the import funds record. Any funds listed in the import file are applied directly to the Awarded Funds screen on the student record.

Note: If a fund is added for a record with a packaging status of **P (Packaged)**, EDExpress automatically updates the status to **M (Manually Adjusted Package)**.

Requirements

The following two requirements must be addressed when building your packaging funds record:

- The Social Security Number (SSN) on the funds record must be for a student who already exists on the Packaging database.

- The Fund Code in the import file must already exist in the Packaging Fund Maintenance Setup.

Any fund amount listed in the import file is added to the student record. If a fund code already exists on a student record and the import file contains another add record for that code, the fund is added to the student record and appears twice on the Awarded Fund screen. For example, if a student has a Subsidized Stafford loan amount of $2,000 and a file is imported containing an additional Subsidized Stafford of $1,000, two loans show on the Awarded Funds screen for this student. The original loan still reads $2,000 and the additional loan is awarded for $1,000, resulting in a $3,000 total Subsidized Stafford Loan.

Export Record Description

You can export specific information from your Packaging records in EDExpress to other school systems, including disbursement systems, by defining a customized export record layout via the File Format option under the Tools menu item in EDExpress. The file formats can be printed in layout format by selecting **File, Print, Packaging, Record Layout - User Defined Formats** from the EDExpress main screen. The export record layout provides the title, type (alpha/numeric), and size for each field.

In order to set up your file formats, go to the Tools menu in EDExpress, select the File Format option, and then Packaging. On this screen you must give the file format a two-character (alpha or numeric) identifier and a title. You can include Packaging, Demographic, and User Database fields in your export format.

In order to initiate an external export, go to **File, Export, Packaging, Packaging Data**. On this screen designate the file format code you want to use and the destination of the file that is created. You can also limit the number of records being exported by using available selection criteria.

Packaging Import External Add Record Layout

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
1	1	9	9	Student's Original Social Security Number	001010001 to 999999999	Right
2	10	11	2	Name ID	Uppercase A-Z Space(s) . (period) ' (apostrophe) - (dash)	Left
3	12	13	2	Transaction Number	00 to 99 (This is the ISIR Transaction Number)	Right
4	14	22	9	Student's Current Social Security Number	001010001 to 999999999	Right
5	23	38	16	Student's Last Name	0-9 Uppercase A-Z Space(s) . (period) ' (apostrophe) - (dash) Can be Blank	Left
6	39	50	12	Student's First Name	0-9 Uppercase A-Z Space(s) . (period) ' (apostrophe) - (dash) Can be Blank	Left
7	51	51	1	Middle Initial	Uppercase A-Z Can be Blank	Left

Packaging Import External Add Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
8	52	86	35	Permanent Mailing Address	0-9 Uppercase A-Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s) Can be Blank	Left
9	87	102	16	Student's Permanent City	0-9 Uppercase A-Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s) Can be Blank	Left
10	103	104	2	Student's Permanent State	Uppercase A-Z Valid postal code from State/Country table Can be Blank	Left
11	105	113	9	Student's Permanent Zip Code	000000000 to 999999999 Can be Blank	Right
12	114	123	10	Student's Permanent Phone Number	0000000000 to 9999999999 Can be Blank	Right

Packaging Import External Add Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
13	124	158	35	Local Address	0-9 Uppercase A-Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s) Can be Blank	Left
14	159	174	16	Local Address City	0-9 Uppercase A-Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s) Can be Blank	Left
15	175	176	2	Local Address State	Uppercase A-Z Valid postal code from State/Country table	Left
16	177	185	9	Local Zip Code	000000000 to 999999999	Right
17	186	195	10	Local Phone Number	0000000000 to 9999999999	Left

Packaging Import External Add Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
18	196	196	1	Grade Level in College in 2001-2002	0 = 1st year undergraduate/never attended college 1 = 1st year undergraduate/attended college before 2 = 2nd year undergraduate/sophomore 3 = 3rd year undergraduate/junior 4 = 4th year undergraduate/senior 5 = 5th year/other undergraduate 6 = 1st year graduate/professional 7 = Continuing graduate/professional or beyond	Left
19	197	200	4	Academic Year Profile Code	0-9 Uppercase A-Z Valid Academic Year Profile code defined in Setup	Left
20	201	201	1	Dependency Status	I = Independent D = Dependent Can be Blank	Left
21	202	205	4	Budget Code	Valid Budget Code defined in Setup Can be Blank	Left
22	206	210	5	Primary EFC	00000 to 99999 Blank = None calculated	Left
23	211	211	1	Pell Verification Status	Uppercase A-Z Contain only: N = Not Selected A = Accurate Data W = Without Documentation T = Tolerance C = Calculated R = Reprocessed S = Selected by CPS, Not Verified	Left

Packaging Import External Add Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
24	212	212	1	Student Is Selected for Verification	Y, N, or *	Left
25	213	217	5	Parent Contribution	-99999 to 99999	Right
26	218	225	8	Total Income	-99999999 to 99999999	Right
27	226	226	1	Enrollment Status Term 1	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
28	227	227	1	Enrollment Status Term 2	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
29	228	228	1	Enrollment Status Term 3	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
30	229	229	1	Enrollment Status Term 4	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
31	230	230	1	Enrollment Status Term 5	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
32	231	231	1	Housing Plans	1 = On-campus 2 = Off-campus 3 = With parent(s) Can be Blank	Left
33	232	233	2	SAP Indicator	Valid SAP code defined in Setup Can be Blank	Left

Packaging Import External Add Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
34	234	234	1	Default Status Indicator	Y = In Default N = Not in Default Z = Override	Left
35	235	235	1	Interested in Employment?	Y = Yes N = No Can be Blank	Left
36	236	236	1	Interested in Student Loan?	Y = Yes N = No Can be Blank	Left
37	237	238	2	Student's State of Legal Residence	Uppercase A-Z Valid postal code from State/Country table Can be Blank	Left
38	239	239	1	Borrower Based Indicator	1 = Yes Blank = No	Left
39	240	247	8	Transaction Processed Date	Format is CCYYMMDD 20010101 to 20021231	Right
40	248	248	1	Simplified Needs Indicator	1 = Yes 0 = No	Left
41	249	249	1	Overaward Indicator	Y = Overaward exists N= No Overaward exists E = Exception R = Resolved Can be Blank	Left
42	250	254	5	Pell EFC	00000 to 99999	Right
43	255	255	1	Automatic Zero EFC	Y = Yes, EFC set to zero based on income criteria Blank = Flag not set	Left
44	256	256	1	Update Demo Record Flag	Y = Yes, update demo record Blank = Do not update demo record	Left
45	257	257	1	Prior Degree?	1 = Yes, Student has prior degree 0 = No, Student does not have prior degree	Left

Packaging Import External Add Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
46	258	258	1	Pell Eligibility Flag	1 = Yes, Student is Pell Eligible Blank = No, Student is not Pell Eligible	Left
47	259	266	8	Application Received Date	Format is CCYYMMDD 20010101 to 20021231	Left
48	267	267	1	Low Tuition	0 or blank 1 = $0 2 = $1 - $262 3 = $263 - $525	Right
49	268	273	6	Aggregate Subsidized Loan Amount	000000 to 999999	Right
50	274	279	6	Aggregate Unsubsidized Loan Amount	000000 to 999999	Right
51	280	285	6	Aggregate Perkins Loan Amount	000000 to 999999	Right
		Total Bytes	**285**			

Packaging Import External Change Record Layout

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
1	1	9	9	Original SSN	001010001 to 999999999	Right
2	10	11	2	Name ID	Uppercase A-Z Space(s) . (period) ' (apostrophe) - (dash)	Left
3	12	13	2	Transaction Number	00 – 99 (This is the ISIR Transaction Number)	Right
4	14	15	2	Sequence Numbers	01-99	Right
5	16	19	4	Change Field Number 1	Field number representing the first field to be changed.	Left
6	20	54	35	Value 1	The value first field should be changed to.	Left
7	55	58	4	Change Field Number 2	Field number representing the second field to be changed.	Left
8	59	93	35	Value 2	The value second field should be changed to.	Left
9	94	97	4	Change Field Number 3	Field number representing the third field to be changed.	Left
10	98	132	35	Value 3	The value third field should be changed to.	Left
11	133	136	4	Change Field Number 4	Field number representing the fourth field to be changed.	Left
12	137	171	35	Value 4	The value fourth field should be changed to.	Left
13	172	175	4	Change Field Number 5	Field number representing the fifth field to be changed.	Left
14	176	210	35	Value 5	The value fifth field should be changed to.	Left
15	211	214	4	Change Field Number 6	Field number representing the sixth field to be changed.	Left
16	215	249	35	Value 6	The value sixth field should be changed to.	Left

Packaging Import External Change Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content	Justify
17	250	253	4	Change Field Number 7	Field number representing the seventh field to be changed.	Left
18	254	288	35	Value 7	The value seventh field should be changed to.	Left
19	289	292	4	Change Field Number 8	Field number representing the eighth field to be changed.	Left
20	293	327	35	Value 8	The value eighth field should be changed to.	Right
21	328	331	4	Change Field Number 9	Field number representing the ninth field to be changed.	Left
22	332	366	35	Value 9	The value ninth field should be changed to.	Left
23	367	370	4	Change Field Number 10	Field number representing the tenth field to be changed.	Left
24	371	405	35	Value 10	The value tenth field should be changed to.	Left
		Total Bytes	**405**			

Packaging Import Change Fields

Field #	Field Length	Field Name	Valid Field Content	Justify
004	12	Student's First Name	0-9 Uppercase A-Z Space(s) . (period) ' (apostrophe) - (dash) Can be Blank	Left
005	1	Middle Initial	Uppercase A-Z Can be Blank	Left
006	16	Student's Last Name	0-9 Uppercase A-Z Space(s) . (period) ' (apostrophe) - (dash) Can be Blank	Left
007	9	Student's Current Social Security Number	001010001-999999999	Left
008	35	Permanent Mailing Address	0-9 Uppercase A-Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s) Can be Blank	Left

Packaging Import Change Fields (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
009	16	Student's Permanent City	0-9 Uppercase A-Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s) Can be Blank	Left
010	2	Student's Permanent State	Uppercase A-Z Valid postal code from State/Country table Can be Blank	Left
011	9	Student's Permanent Zip Code	000000000 to 999999999 Can be Blank	Right
012	35	Local Address	0-9 Uppercase A-Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s) Can be Blank	Left

Packaging Import Change Fields (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
013	16	Local Address City	0-9 Uppercase A-Z . (Period) , (Comma) ' (Apostrophe) - (Dash) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Can be Blank	Left
014	2	Local Address State	Uppercase A-Z Valid postal code from State/Country table Can be Blank	Left
015	9	Local Zip Code	000000000 to 999999999 Can be Blank	Right
016	10	Student's Permanent Phone Number	0000000000 to 9999999999 Can be Blank	Right
017	20	Student's Driver's License Number	0-9 Uppercase A-Z Space(s) - (dash) * (asterisk) Can be Blank	Left
018	2	Student's Driver's License State Code	Valid postal code from State/Country table Can be Blank	Left
019	2	Student's State of Legal Residence	Uppercase A-Z Valid postal code from State/Country table	Left
020	8	Student's Date of Birth	Format is CCYYMMDD 19000101 to Current Date	Right
022	5	EFC	00000 to 99999 Can be Blank	Right

Packaging Import Change Fields (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
023	4	Academic Year Profile Code	0-9 Uppercase A-Z Valid Academic Year Profile code defined in Setup	Left
024	1	Default Status Indicator	Y = In Default N = Not in Default Z = Override	Left
025	2	SAP Indicator	Valid SAP code defined in Setup Can be Blank	Left
026	4	Budget Code	0-9 Uppercase A-Z + (plus sign) - (dash) * (asterisk) # (number sign) . (period)	Left
027	1	Dependency Status	I = Independent D = Dependent	Left
028	2	Student is Selected for Verification	Y, N, or *	Left
029	1	Enrollment Status Term 1	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
030	1	Enrollment Status Term 2	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
031	1	Enrollment Status Term 3	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right

Packaging Import Change Fields (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
032	1	Enrollment Status Term 4	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
033	1	Enrollment Status Term 5	1=Full time 2=3/4 time 3=1/2 time 4=Less than 1/2 time 5=Not Enrolled	Right
037	8	Total Income	-99999999 to 99999999	Right
039	1	Grade Level in College in 2000-2001	0 = 1st year undergraduate/never attended college 1 = 1st year undergraduate/attended college before 2 = 2nd year undergraduate/sophomore 3 = 3rd year undergraduate/junior 4 = 4th year undergraduate/senior 5 = 5th year/other undergraduate 6 = 1st year graduate/professional 7 = Continuing graduate/professional or beyond	Right
040	1	Housing Plan	1 = On-campus 2 = Off-campus 3 = With parent(s) Can be Blank	Left
043	1	Interested in Employment?	Y = Yes N = No Can be Blank	Left
044	1	Interested in Student Loan?	Y = Yes N = No Can be Blank	Left
045	6	Aggregate Subsidized Loan Amount	000000 to 999999	Right
046	6	Aggregate Unsubsidized Loan Amount	000000 to 999999	Right

Packaging Import Change Fields (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
047	6	Aggregate Perkins Loan Amount	000000 to 999999	Right
052	1	Packaging Result	A = Any part of the Packaging Results accepted D = Package Totally Declined O = Offer S = Suspend	Left
292	1	Automatic Zero EFC	Y = Yes, EFC set to zero based on income criteria Blank = Flag not set	Left
294	5	Pell EFC	00000 to 99999	Right
295	10	Local Phone Number	0000000000 to 9999999999	Left
296	1	Pell Verification Status	Uppercase A-Z Contain only: N = Not Selected A = Accurate Data W = Without Documentation T = Tolerance C = Calculated R = Reprocessed S = Selected by CPS, Not Verified	Left
298	1	Simplified Needs Indicator	1 = Yes 0 = No	Left
299	8	Transaction Processed Date	Format is CCYYMMDD 20010101 to 20021231	Right
300	1	Prior Degree	1 = Yes, student has prior degree 0 = No, Student does not have prior degree	Left
301	1	Pell Eligibility Flag	1 = Yes, record is Pell Eligible per CPS Blank = Record is not Pell Eligible per CPS	Left
302	8	Application Received Date	Format is CCYYMMDD 20010101 to 20021231	Right

Packaging Import Change Fields (Continued)

Field #	Field Length	Field Name	Valid Field Content	Justify
303	5	Parent Contribution	-99999 to 99999	Right
304	1	Low Tuition	0 or blank 1 = $0 2 = $1 - $149 3 = $150 - $299	Right
305	1	Print Letter in Next Batch	Y = Yes N = No	N/A

Packaging Import Add Funds Amount Record Layout

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content
1	1	9	9	Original SSN	001010001 to 999999999
2	10	11	2	Name ID	Uppercase A-Z Space(s) . (period) ' (apostrophe) - (dash)
3	12	13	2	Transaction Number	00 - 99 (This is the ISIR Transaction Number)
4	14	18	5	Sequence Number	The sequence number of this change record.
5	19	26	8	Fund Code 1	As defined in Setup. Must be Fund Code name existing on database.
6	27	31	5	Fund Value 1	Valid Amount for Current Total on student record Awarded Funds grid.
7	32	39	8	Fund Code 2	As defined in Setup. Must be Fund Code name existing on database.
8	40	44	5	Fund Value 2	Valid Amount for Current Total on student record Awarded Funds grid.
9	45	52	8	Fund Code 3	As defined in Setup. Must be Fund Code name existing on database.
10	53	57	5	Fund Value 3	Valid Amount for Current Total on student record Awarded Funds grid.
11	58	65	8	Fund Code 4	As defined in Setup. Must be Fund Code name existing on database.
12	66	70	5	Fund Value 4	Valid Amount for Current Total on student record Awarded Funds grid.
13	71	78	8	Fund Code 5	As defined in Setup. Must be Fund Code name existing on database.
14	79	83	5	Fund Value 5	Valid Amount for Current Total on student record Awarded Funds grid.
15	84	91	8	Fund Code 6	As defined in Setup. Must be Fund Code name existing on database.
16	92	96	5	Fund Value 6	Valid Amount for Current Total on student record Awarded Funds grid.

Packaging Import Add Funds Amount Record Layout (Continued)

Field #	Start Position	End Position	Field Length	Field Name	Valid Field Content
17	97	104	8	Fund Code 7	As defined in Setup. Must be Fund Code name existing on database.
18	105	109	5	Fund Value 7	Valid Amount for Current Total on student record Awarded Funds grid.
19	110	117	8	Fund Code 8	As defined in Setup. Must be Fund Code name existing on database.
20	118	122	5	Fund Value 8	Valid Amount for Current Total on student record Awarded Funds grid.
21	123	130	8	Fund Code 9	As defined in Setup. Must be Fund Code name existing on database.
22	131	135	5	Fund Value 9	Valid Amount for Current Total on student record Awarded Funds grid.
23	136	143	8	Fund Code 10	As defined in Setup. Must be Fund Code name existing on database.
24	144	148	5	Fund Value 10	Valid Amount for Current Total on student record Awarded Funds grid.
		Total Bytes	**148**		

State/Country Jurisdiction Codes

State/County	Code	State/Country	Code
Alabama	AL	Nebraska	NE
Alaska	AK	Nevada	NV
American Samoa	AS	New Hampshire	NH
Arizona	AZ	New Jersey	NJ
Arkansas	AR	New Mexico	NM
California	CA	New York	NY
Canada	CN	North Carolina	NC
Colorado	CO	North Dakota	ND
Connecticut	CT	Northern Mariana Islands	MP
Delaware	DE	Ohio	OH
District of Columbia	DC	Oklahoma	OK
Federated States of Micronesia	FM	Oregon	OR
Florida	FL	Palau	PW
Georgia	GA	Pennsylvania	PA
Guam	GU	Puerto Rico	PR
Hawaii	HI	Rhode Island	RI
Idaho	ID	South Carolina	SC
Illinois	IL	South Dakota	SD
Indiana	IN	Tennessee	TN
Iowa	IA	Texas	TX
Kansas	KS	Utah	UT
Kentucky	KY	Vermont	VT
Louisiana	LA	Virgin Islands	VI
Maine	ME	Virginia	VA
Marshall Islands	MH	Washington	WA
Maryland	MD	West Virginia	WV
Massachusetts	MA	Wisconsin	WI
Michigan	MI	Wyoming	WY
Minnesota	MN	Military Location Code AA	AA **
Mississippi	MS	Military Location Code AE	AE **
Missouri	MO	Military Location Code AP	AP **
Montana	MT	Foreign Address	FC
Mexico	MX		

**=These codes are used for student's mailing state only. They are not valid for state of legal residence or driver's license state.

Packaging Setup

Overview

To access the Packaging Setup screens, choose the Tools option from the menu bar. Choose **Setup, Packaging**. Setting up the Packaging functions in EDExpress includes looking at the following areas:

- System Setup
- Queries
- Academic Year Profile
- Fund Maintenance
- Award Methodology
- Budgets
- User-Defined Formulas
- SAP Values

You may also want to look at Document Tracking, which is a global EDExpress function useful in the Packaging Process. To set up Document Tracking, choose **Tools, Setup, Global, Document Tracking**. You can also create Award Letters using EDExpress. Select **Tools, Setup, Global, User-Defined Text, Award Letter Text**.

These Packaging Setup sheets are designed to be a helpful guide for getting started in EDExpress Packaging. Click the **F1** key while in a Setup screen or choose **Help** on the menu bar to for online help for all EDExpress Packaging functions. We have provided additional setup sheets for your use at the end of this section.

System Setup

Question	Possible Answer	Default Answer	Your Answer
Total Number of Award Letters to be Printed per Student?	1 – 99	2	
Maximum Number of Award Letters to be Sent per Student?	1 – 99	5	
Award Letter Type	O, N	N	
Allow Imported Pell EFC to be Modified?	Checked/Not Checked	Checked	
Packaging Results Default Status	O, A	A	
Priority Deadline Date Type	A, P, R, U	P	
User-Defined Date Name	See Online Help in Packaging System Setup	N/A	
Use Low Tuition?	Checked/Not Checked	Not Checked	
Default Housing Plans	1 - 3	2	

Total Number of Award Letters to be Printed per Student? Indicates how many letters to print for a given student.

Maximum Number of Award Letters to be Sent per Student? This option allows you to batch print a student's award letter the number of times you specify.

Award Letter Type. Determines the format of the award letter printed. See EDExpress online help for more detail on the differences between types of Award Letters.

Allow Imported Pell EFC to be Modified? Determines whether the Pell EFC field is view-only or can be modified on records created by ISIR or external import.

Packaging Results Default Status. Determines the status of funds on a student record after packaging. You may choose to default all packaged awards to either accepted status or offered status.

Priority Deadline Date Type. Determines what date the Packaging database uses when determining which records to include or exclude from the process being executed. If the Date Type chosen is U (User-Defined Date), the date is pulled from a User Database field.

System Setup (Continued)

User-Defined Date Name. The name of the User Database field used when determining which records to include or exclude when running a process. This field is available only if the Priority Deadline Date Type is set to U.

Use Low Tuition? This field, combined with the new Low Tuition Flag field on the Awards tab, tells the Packaging system to use the Low Tuition tables to determine the Pell Award amount.

Default Housing Plans. Indicates the type of housing the Packaging system defaults on manually created records and ISIRs imported with a blank housing code. The default value for this field is 2.

Queries

Title			
This Query Uses	AND		OR

Field	Operator	Value	Prompt at Execution?
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		

Use this query with:

_____

_____

_____

_____

_____

Query. A set of criteria that describes a particular student population. Queries are used in functions like Print and Export to select specific groups of student records from all the records in the database.

Title. A 25-character description of the query. You create this description using any combination of characters A-Z or 0-9. Give the query a easily recognizable name, such as Full Year Students or In-State Dependent Students.

Queries (Continued)

Field. Defines which field within the database you want to base this criteria.

Operator. Defines how you want to compare this field.

Value. Defines with what you want to compare the field.

Prompt at Execution. Allows you to change the values used in the query every time it is run. When the query is used, you are asked to enter a value to be queried on. For example, if you want to run a Prompt at Execution query to locate all students added to the Packaging database on a particular date, EDExpress asks you to enter a date to be used in the query.

Note: Parameter queries can be used for reports but **cannot** be attached to any packaging setup.

AND and OR. Two logical operators used to link multiple conditions. If AND is used, then both conditions must be true. If OR is used, the query chooses records where either condition is true. You may create complex queries using both AND and OR by **nesting** query statements within each other.

Note: When using *OR* statements attached to Budget setups, you must use Left and Right parenthesis.

Append, Remove, and Change. Used to modify the query statement within the Criteria box. Each phrase within the query is placed on its own line within the Criteria box. **Append** creates a new line for the query. **Remove** deletes the currently selected line within the query. **Change** allows you to modify the currently selected line within the Criteria box.

Value Help. Presents you with a list of valid field content for the currently selected Field.

Add Left (, Add Right), Remove Left (, Remove Right). Used to modify parenthetical phrases within a query. In using parenthetical phrases, you may create very complex queries by placing query phrases within each other. For example, to get a list of all students either from Virginia with an EFC of less than 1000 OR all students from Iowa, the basic format of the query would be ((State of Legal Residence = VA) AND (EFC < 1000)) OR (State of Legal Residence = IA). By placing a phrase within an extra set of parentheses, EDExpress looks at that part of the query first.

Please view **online Query help** for a detailed description of EDExpress Query.

Academic Year Profile

The Academic Year Profile defines when you disburse money to your students.

Question	Possible Answer	Default Answer	Your Answer
Code	4 Characters (A-Z, 0-9)	N/A	
Default	Checked/Not Checked	Not Checked	
Title	Any Keyboard Character	N/A	
Pell Grant Formula	1 - 6	1	
Program Proration Percentage	00.00 - 99.99	N/A	
EFC Program Length to Import From ISIR Database	1-12	9	

Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %

Code. A 4-character field used to identify the Academic Year Profile. You create the code using any combination of A-Z, 0-9.

Default. Tells EDExpress if this is the Academic Year Profile you are using most often for your students. Only one AYP can be the default.

Title. A 25-character description of this AYP. Create this description using any combination of keyboard characters. Give the AYP an easily recognizable name, such as Full Year Students or In-State Dependent Students.

Pell Grant Formula. Lists the 6 possible Pell Grant formulas. If your school has programs that use different Pell Grant formulas, you must create multiple AYP profiles.

Program Proration Percentage. This is required for Pell Grant formulas 2, 4, and 5. This field is disabled for formulas 1, 3, and 6.

Academic Year Profile (Continued)

EFC Program Length to Import from the ISIR database. Allows you to choose any of the different program lengths from the ISIR.

Term. An 8-character field you use to define the breakdown of the award. Valid characters for the Title include A-Z, 0-9, +, 1 -, *, ., #. The Title appears on the Award Letter, so it should be given a recognizable name.

Enrollment Status. Can be full-time, 3/4 time, 1/2 time, <1/2 time, or not enrolled.

Pell %. Used for formulas 3, 4, 5, and 6. This field determines what percentage of the student's annual award is disbursed at each term.

FSEOG %, Grant %, Perkins %, WS %, Subsidized Loan %, Other Loan%. Determine what percentage of the student's annual award is disbursed at each term for the respective fund type. The total of the percentages cannot exceed 100%.

Note: The enrollment status field does not award any funds if Not Enrolled is the status shown. This field also affects Pell awarding. For example, if a student is enrolled 1/2 time the Pell award is halved, but all other funds are awarded the full amount.

Fund Maintenance

Each source of funding for your school must be defined in Fund Maintenance.

Question	Possible Answer	Default Answer	Your answer
Fund Code	8 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Fund Description	25 Characters (Any Keyboard Character)	N/A	
Aid Type	See Detail	N/A	
Do not remove if unpackaged?	Checked/Unchecked	Unchecked	
Remaining Need	Minimum Need/Maximum Need/Award Amount	N/A	
Criteria	All Non-Parameter Packaging Queries	N/A	
Beginning Balance	00000000-99999999	N/A	
Adjustment to Beginning Balance	00000000-99999999	N/A	
Funds Awarded	00000000-99999999	N/A	
Current Balance	00000000-99999999	N/A	

Fund Code. An 8-character field EDExpress uses to identify the fund. Create the code using any combination of characters A-Z, 0-9, +, -, *, ., or #.

Fund Description. A 25-character description of this fund. You create this description using any combination of valid keyboard characters. The Fund Description appears on the Award Letter, so it should be given an easily recognizable name.

Aid Type. Used by EDExpress to govern how to award the fund. The options are:

D   Unsubsidized Loan (Unsub, Need Based)

E   Federal Supplemental Educational Opportunity Grant (FSEOG)

F   Pell Grant

G   Any grant or scholarship, but not Pell Grant or FSEOG

K   Perkins loan

L   Other Need Based Loan (NB) (not Perkins, Direct, or Stafford)

N   Non-need based loan (NNB)

Fund Maintenance (Continued)

O   Outside resources

P   Parent Loan (PLUS)

R   Grant, Non-need Based

S   Subsidized Loan

U   Unsubsidized Loan

V   Chapter 30 VA Benefits/Americorps

W   Federal Work-Study (WS)

Y   Other Work-Study

Do not remove if unpackaged? If selected, this option allows you to unpackage records without removing this fund.

Remaining Need. Awards a specific amount of a fund at different levels of remaining need within the packaging process.

Criteria. List all the queries you have currently created in the Query portion of EDExpress. You may choose any query to limit the population of students who receive this fund to the parameters of the query. This field can be left blank.

Beginning Balance. The actual amount of money you have available to award under this fund for the school year. For some funds, such as Pell Grant and Federal Loans, this field automatically fills in with 9s.

Adjustment to Beginning Balance. Any positive or negative adjustment to the Beginning Balance.

Funds Awarded. A read-only field that displays how much money has been awarded from this fund.

Current Balance. A read-only field that displays how much money is still available to be awarded from this fund.

Award Methodology

The award methodology is a group of funds. These funds are only awarded to a particular population of students.

Question	Possible Answer	Default Answer	Your Answer
Code	4 Characters (A-Z, 0-9)	N/A	
Title	50 Characters Any Keyboard Character	N/A	
Priority	3 Characters (001-999)	N/A	
Use Percentages/Use Dollar Amount	Option Button	Use Percentages	
Self-Help Aid Maximum %	0-100	100%	
Self-Help Aid Maximum Amount	0-99999	$0	
Gift Aid Maximum %	0-100	100%	
Gift Aid Maximum Amount	0-99999	$0	
Criteria	All Defined Packaging Queries	N/A	

Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need

Award Methodology (Continued)

Code. A 4-character field EDExpress uses to index the Award Methodology. You create the code using any combination of characters A-Z or 0-9.

Title. A 50-character description of this Award Methodology. You create this description using any combination of valid keyboard characters.

Priority. The order in which the EDExpress accesses this Award Methodology to determine if it is appropriate for the student currently being packaged.

Use Percentages/Use Dollar Amount. Determines whether the Self-Help Aid Maximum and Gift Aid Maximum fields use Percentages or Dollar Amounts.

Self-Help Aid Maximum %. The highest percentage amount of the student's unmet need that EDExpress awards in self-help aid.

Self-Help Aid Maximum Amount. The highest total amount in dollars that a student can receive in self-help aid.

Gift Aid Maximum %. The highest percentage amount of the student's unmet need that EDExpress awards in gift aid.

Gift Aid Maximum Amount. The highest total amount in dollars that a student can receive in gift aid.

Criteria. Lists all the queries you have currently created in the Query portion of EDExpress. Using criteria limits the population of students who are considered for this methodology. This field can be left blank.

Fund Code. Lists all the funds set up in the Fund Maintenance portion of EDExpress. You may assign up to 20 funds to an Award Methodology.

Note: Pell Grant cannot be added to an Award Methodology. Any student eligible to receive a Pell Grant is awarded the fund before being considered for any other type of aid.

Fund Priority. Determines the order that funds are considered in satisfying the student's unmet need. Fund Priority runs from 1 through 20.

School Min. This is the minimum amount the school awards to a student from this fund. You can set the School Min between 00000-99999.

School Max. This is the maximum amount the school awards to a student from this fund. You can set the School Max between 00000-99999.

Award Methodology (Continued)

Min EFC. The lowest EFC value that a student's ISIR may have and still receive this fund. You may set the Min EFC between 00000-99999.

Max EFC. The highest EFC value that a student's ISIR may have and still receive this fund. You may set the Max EFC between 00000-99999.

Remaining Need. Awards a specific amount of a fund at different levels of remaining need within the packaging process.

Budgets

This is where you enter the cost of attendance for students at your school.

Question	Possible Answer	Default Answer	Your Answer
Budget Code	4 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Title	50 Characters Any Keyboard Character	N/A	
Priority	3 Characters 001-999	N/A	
Criteria	All Defined Packaging Queries	N/A	
Budget Total			
Budget Amounts			
Tuition And Fees	00000 to 99999	N/A	
Loan Fees	00000 to 99999	N/A	
Room And Board	00000 to 99999	N/A	
Books And Supplies	00000 to 99999	N/A	
Transportation Costs	00000 to 99999	N/A	
Miscellaneous Amount	00000 to 99999	N/A	
User-Defined Budget Amounts			
Lab Fees	00000 to 99999	N/A	
	00000 to 99999	N/A	
	00000 to 99999	N/A	
	00000 to 99999	N/A	
	00000 to 99999	N/A	

Budget Code. A 4-character field EDExpress uses to identify the Budget. Create the Code using any combination of characters A-Z, 0-9, +, -, *, and #.

Title. A 50-character description of this Budget. Create the Title using any combination of valid keyboard characters.

Budgets (Continued)

Priority. Defines which Budget codes get assigned first to a student record. If a student is eligible for two budgets, the one with the highest priority is assigned to the student record.

Criteria. Lists all the queries you have currently created in the Query portion of EDExpress. Using criteria limits the population of students who are considered for this Budget. This field can be left blank.

Budget Total. Display-only field that displays the monetary total of all the budget items entered.

Budget Amounts. Components you use to build your budgets. Enter amounts for the five hard-coded components and add up to 5 additional user-defined components as needed.

User Defined Budget Amounts. Components you want to consider as part of the overall student budget that is not covered under Budget Amounts.

User Defined Formulas

You can create up to four calculations to enable you to package your students.

Table	Field Name	Operand	Table	Field Name	Description

User-Defined Formulas allow you to calculate data by adding, subtracting, multiplying, or dividing two existing fields in the EDExpress database. For example, subtracting PC (Parent Contribution) from EFC on each student record can create a field called SC (Student Contribution). SC can be used in developing queries.

Note: Only L (Long Integer) User-Defined fields can be used in User Formula calculations.

Database Table. Determines where the value you use in Field 1 resides. The options are:

S = Packaging student database
U = User-defined database
F = Fund database

Field Name. Lists all of the fields that are available from the table chosen in the Database Table 1 field.

Operand. Defines what computation is performed:

+ = Addition
- = Subtraction
* = Multiplication
/ = Division

Database Table. Determines where the value you use in Field 2 resides. The options are:

S = Packaging student database
U = User-Defined database
F = Fund database

Field Name. Lists all of the fields that are available from the table chosen in the Database Table 2 field.

Description. Displays the user-defined name for this formula. Create the code using any combination of 24 characters (A-Z, 0-9).

SAP Values

SAP values allow you to track the Satisfactory Academic Progress of your students.

SAP Code	No Pkg Flag	SAP Description

The SAP Code listing is unlimited; you can create as many SAP values as you choose.

SAP Code. A 2-character field EDExpress uses to identify the code. Use characters **A-Z**, **0-9**, +, **-**, *****, **#**, **.,'**, **%**, <, or >.

No PKG Flag? Determines if students who have been assigned this value are packaged.

SAP Description. A 50-character title for this SAP value. Use characters **A-Z**, **0-9**, +, **-**, *****, **#**, **.,'**, **%**, <, or >.

Document Tracking

Document Tracking is a Global function useful in the Packaging process because it gives you the ability to manage what documents are required of your students.

Question	Possible Answer	Default Answer	Your Answer
Code	10 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Year	9 Characters (0-9, -)	N/A	
Description	50 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Criteria	Any Defined Global Queries	N/A	
Automatic Request	Checked / Not Checked	Not Checked	
Required for Packaging	Checked / Not Checked	Not checked	
Required for Verification	Checked / Not Checked	Not Checked	
Comment Codes	Valid Comment Codes	Blank	

Code. A 10-character field EDExpress uses to identify the document. Use characters A-Z, 0-9, +, -, *, #.

Year. A 9-character code of 0-9, or - used to designate what year this document pertains to. This field is not required.

Description. A 50-character title for this document. The Document description appears on the Document Tracking letter, so you should create a meaningful title.

Criteria. Lists all the queries you have currently created in the Query portion of EDExpress. Choose any one of them to limit the population of students who are assigned this Document.

Automatic Request. Determines whether the document defined is assigned when you choose Add Documents from the Process menu.

Required for Packaging. Determines whether an award can be generated for the student if this document has not been received. If this option is chosen, you are unable to generate a preliminary award.

Document Tracking (Continued)

Required for Verification. Determines whether this document is assigned to all students who are chosen by the CPS for verification.

Comment Codes. You may enter up to 6 ISIR comment codes in the spaces provided. Any students receiving the corresponding comment codes on the ISIRs are assigned the document.

Additional Setup Pages

System Setup

Question	Possible Answer	Default Answer	Your Answer
Total Number of Award Letters to be Printed per Student?	1 – 99	2	
Maximum Number of Award Letters to be Sent per Student?	1 – 99	5	
Award Letter Type	O, N	N	
Allow Imported Pell EFC to be Modified?	Checked/Not checked	Checked	
Packaging Results Default Status	O, A	A	
Priority Deadline Date Type	A, P, R, U	P	
User-Defined Date Name	See Online Help in Packaging System Setup	N/A	
Use Low Tuition?	Checked/Not checked	Not Checked	
Default Housing Plans	1 - 3	2	

Question	Possible Answer	Default Answer	Your Answer
Total Number of Award Letters to be Printed per Student?	1 – 99	2	
Maximum Number of Award Letters to be Sent per Student?	1 – 99	5	
Award Letter Type	O, N	N	
Allow Imported Pell EFC to be Modified?	Checked/Not checked	Checked	
Packaging Results Default Status	O, A	A	
Priority Deadline Date Type	A, P, R, U	P	
User-Defined Date Name	See Online Help in Packaging System Setup	N/A	
Use Low Tuition?	Checked/Not checked	Not Checked	
Default Housing Plans	1 - 3	2	

System Setup (Continued)

Question	Possible Answer	Default Answer	Your Answer
Total Number of Award Letters to be Printed per Student?	1 – 99	2	
Maximum Number of Award Letters to be Sent per Student?	1 – 99	5	
Award Letter Type	O, N	N	
Allow imported Pell EFC to be modified?	Checked/Not Checked	Checked	
Packaging Results Default Status	O, A	A	
Priority Deadline Date Type	A, P, R, U	P	
User-Defined Date Name	See Online Help in Packaging System Setup	N/A	
Use Low Tuition?	Checked/Not Checked	Not Checked	
Default Housing Plans	1 – 3	2	

Question	Possible Answer	Default Answer	Your Answer
Total Number of Award Letters to be Printed per Student?	1 – 99	2	
Maximum Number of Award Letters to be Sent per Student?	1 – 99	5	
Award Letter Type	O, N	N	
Allow imported Pell EFC to be modified?	Checked/Not Checked	Checked	
Packaging Results Default Status	O, A	A	
Priority Deadline Date Type	A, P, R, U	P	
User-Defined Date Name	See Online Help in Packaging System Setup	N/A	
Use Low Tuition?	Checked/Not checked	Not Checked	
Default Housing Plans	1 - 3	2	

Queries

Create your selection criteria here.

Title	
This Query Uses	AND OR

Field	Operator	Value	Prompt at Execution?
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		

Use this query with: _____

_____

_____

_____

_____

_____

Queries (Continued)

Title			
This Query Uses	AND		OR

Field	Operator	Value	Prompt at Execution?
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		
	= Like <> Not Like < > <= =>		

Use this query with: _____

_____

_____

_____

_____

_____

Academic Year Profile

Question	Possible Answer	Default Answer	Your Answer
Code	4 Characters (A-Z, 0-9)	N/A	
Default	Checked/Not Checked	Not Checked	
Title	Any Keyboard Character	N/A	
Pell Grant Formula	1 - 6	1	
Program Proration Percentage	00.00 - 99.99	N/A	
EFC Program Length to Import from ISIR Database	1-12	9	

Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %

Academic Year Profile (Continued)

Question	Possible Answer	Default Answer	Your Answer
Code	4 Characters (A-Z, 0-9)	N/A	
Default	Checked/Not Checked	Not Checked	
Title	Any Keyboard Character	N/A	
Pell Grant Formula	1 - 6	1	
Program Proration Percentage	00.00 - 99.99	N/A	
EFC Program Length to Import from ISIR Database	1-12	9	

Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %

Academic Year Profile (Continued)

Question	Possible Answer	Default Answer	Your Answer
Code	4 Characters (A-Z, 0-9)	N/A	
Default	Checked/Not Checked	Not Checked	
Title	Any Keyboard Character	N/A	
Pell Grant Formula	1 - 6	1	
Program Proration Percentage	00.00 - 99.99	N/A	
EFC Program Length to Import from ISIR Database	1-12	9	

Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %

Fund Maintenance

Question:	Possible Answer	Default Answer	Your Answer
Fund Code	8 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Fund Description	25 Characters (Any Keyboard Character)	N/A	
Aid Type	See Detail	N/A	
Do not remove if unpackaged?	Checked/Unchecked	Unchecked	
Remaining Need	Minimum Need/Maximum Need/Award Amount	N/A	
Criteria	All Non-Parameter Packaging Queries	N/A	
Beginning Balance	00000000-99999999	N/A	
Adjustment to Beginning Balance	00000000-99999999	N/A	
Funds Awarded	00000000-99999999	N/A	
Current Balance	00000000-99999999	N/A	

Question:	Possible Answer	Default Answer	Your Answer
Fund Code	8 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Fund Description	25 Characters (Any Keyboard Character)	N/A	
Aid Type	See Detail	N/A	
Do not remove if unpackaged?	Checked/Unchecked	Unchecked	
Remaining Need	Minimum Need/Maximum Need/Award Amount	N/A	
Criteria	All Non-Parameter Packaging Queries	N/A	
Beginning Balance	00000000-99999999	N/A	
Adjustment to Beginning Balance	00000000-99999999	N/A	
Funds Awarded	00000000-99999999	N/A	
Current Balance	00000000-99999999	N/A	

Fund Maintenance (Continued)

Question:	Possible Answer	Default Answer	Your Answer
Fund Code	8 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Fund Description	25 Characters (Any Keyboard Character)	N/A	
Aid Type	See Detail	N/A	
Do not remove if unpackaged?	Checked/Unchecked	Unchecked	
Remaining Need	Minimum Need/Maximum Need/Award Amount	N/A	
Criteria	All Non-Parameter Packaging Queries	N/A	
Beginning Balance	00000000-99999999	N/A	
Adjustment to Beginning Balance	00000000-99999999	N/A	
Funds Awarded	00000000-99999999	N/A	
Current Balance	00000000-99999999	N/A	

Question:	Possible Answer	Default Answer	Your Answer
Fund Code	8 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Fund Description	25 Characters (Any Keyboard Character)	N/A	
Aid Type	See Detail	N/A	
Do not remove if unpackaged?	Checked/Unchecked	Unchecked	
Remaining Need	Minimum Need/Maximum Need/Award Amount	N/A	
Criteria	All Non-Parameter Packaging Queries	N/A	
Beginning Balance	00000000-99999999	N/A	
Adjustment to Beginning Balance	00000000-99999999	N/A	
Funds Awarded	00000000-99999999	N/A	
Current Balance	00000000-99999999	N/A	

Award Methodology

Question	Possible Answer	Default Answer	Your Answer
Code	4 Characters (A-Z, 0-9)	N/A	
Title	50 Characters Any Keyboard Character	N/A	
Priority	3 Characters (001-999)	N/A	
Use Percentages/Use Dollar Amount	Option Button	Use Percentages	
Self-Help Aid Maximum %	0-100	100%	
Self-Help Aid Maximum Amount	0-99999	$0	
Gift Aid Maximum %	0-100	100%	
Gift Aid Maximum Amount	0-99999	$0	
Criteria	All Defined Packaging Queries	N/A	

Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need

Award Methodology(Continued)

Question	Possible Answer	Default Answer	Your Answer
Code	4 Characters (A-Z, 0-9)	N/A	
Title	50 Characters Any Keyboard Character	N/A	
Priority	3 Characters (001-999)	N/A	
Use Percentages/Use Dollar Amount	Option Button	Use Percentages	
Self-Help Aid Maximum %	0-100	100%	
Self-Help Aid Maximum Amount	0-99999	$0	
Gift Aid Maximum %	0-100	100%	
Gift Aid Maximum Amount	0-99999	$0	
Criteria	All Defined Packaging Queries	N/A	

Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need

Budgets

Question	Possible Answer	Default Answer	Your Answer
Budget Code	4 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Title	50 Characters Any Keyboard Character	N/A	
Priority	3 Characters 001-999	N/A	
Criteria	All Defined Packaging Queries	N/A	
Budget Total			
Budget Amounts			
Tuition and Fees	00000 to 99999	N/A	
Loan Fees	00000 to 99999	N/A	
Room and Board	00000 to 99999	N/A	
Books and Supplies	00000 to 99999	N/A	
Transportation Costs	00000 to 99999	N/A	
Miscellaneous Amount	00000 to 99999	N/A	
User-Defined Budget Amounts			
Lab Fees	00000 to 99999	N/A	
	00000 to 99999	N/A	
	00000 to 99999	N/A	
	00000 to 99999	N/A	
	00000 to 99999	N/A	

Budgets (Continued)

Question	Possible Answer	Default Answer	Your Answer
Budget Code	4 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Title	50 Characters Any Keyboard Character	N/A	
Priority	3 Characters 001-999	N/A	
Criteria	All Defined Packaging Queries	N/A	
Budget Total			
Budget Amounts			
Tuition and Fees	00000 to 99999	N/A	
Loan Fees	00000 to 99999	N/A	
Room and Board	00000 to 99999	N/A	
Books and Supplies	00000 to 99999	N/A	
Transportation Costs	00000 to 99999	N/A	
Miscellaneous Amount	00000 to 99999	N/A	
User-Defined Budget Amounts			
Lab Fees	00000 to 99999	N/A	
	00000 to 99999	N/A	
	00000 to 99999	N/A	
	00000 to 99999	N/A	
	00000 to 99999	N/A	

User-Defined Formulas

Table	Field Name	Operand	Table	Field Name	Description

Table	Field Name	Operand	Table	Field Name	Description

Table	Field Name	Operand	Table	Field Name	Description

SAP Values

SAP Code	No Pkg Flag	SAP Description

SAP Code	No Pkg Flag	SAP Description

SAP Code	No Pkg Flag	SAP Description

Document Tracking

Document Tracking is a Global function useful in the packaging process.

Question	Possible Answer	Default Answer	Your Answer
Code	10 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Year	9 Characters (0-9, -)	N/A	
Description	50 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Criteria	Any Defined Global Queries	N/A	
Automatic Request	Checked / Not Checked	Not Checked	
Required for Packaging	Checked / Not Checked	Not Checked	
Required for Verification	Checked / Not Checked	Not Checked	
Comment Codes	Valid Comment Codes	Blank	

Question	Possible Answer	Default Answer	Your Answer
Code	10 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Year	9 Characters (0-9, -)	N/A	
Description	50 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Criteria	Any Defined Global Queries	N/A	
Automatic Request	Checked / Not Checked	Not Checked	
Required For Packaging	Checked / Not Checked	Not checked	
Required For Verification	Checked / Not Checked	Not Checked	
Comment Codes	Valid Comment Codes	Blank	

Document Tracking (Continued)

Question	Possible Answer	Default Answer	Your Answer
Code	10 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Year	9 Characters (0-9, -)	N/A	
Description	50 Characters (A-Z, 0-9, +, -, *, #, .)	N/A	
Criteria	Any Defined Global Queries	N/A	
Automatic Request	Checked / Not Checked	Not Checked	
Required For Packaging	Checked / Not Checked	Not checked	
Required For Verification	Checked / Not Checked	Not Checked	
Comment Codes	Valid Comment Codes	Blank	

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